

PARTNERSHIP EVALUATION TOOL PART 1

Guidance Notes

Further guidance and assistance in using this tool is available from John Hodt on extension 8066, or by email on john.hodt@dudley.gov.uk.

This Partnership Evaluation Tool (PET) has been developed by the corporate Partnership Working Improvement Group, which was set up to address the areas for improvement raised in the Audit Commission's 2004 report on partnership working at Dudley MBC. The intention of the PET is to enable you to undertake a light touch assessment of the effectiveness of the partnerships that you are involved in. The PET is designed to answer three questions:

1. How important to the Council is our involvement in this partnership?
2. How effective is our involvement in this partnership?
3. What are our priority actions for increasing the effectiveness of our involvement in this partnership?

It is important that you are honest, the PET is not intended as a whistle blowing exercise, but as a self assessment of partnership working to enable you to identify areas for improvement. Clearly improvements can only enhance our partnership working insofar as they genuinely reflect problem issues. Part 1 will give an overview of the strategic significance and effectiveness of your partnership, which will enable identification of those partnerships that are the highest priority for the more detailed evaluation in part 2. The first set of questions cover strategic significance, and the second effectiveness; you can then use the answers as directed to plot the position of your partnership on the chart on page 2.

STRATEGIC SIGNIFICANCE

Which of the council plan priorities is the partnership working to deliver?

- Providing local people with responsive and efficient services
- a clean and healthy borough
- ensuring the safety of local people
- caring for people
- providing well paid jobs for local people
- helping people gain knowledge and skills.

Score half a point for each of the above that you can say yes to, and then consider:

- Has your partnership been charged with responsibility for meeting targets that are in the council plan?
- Is there a statutory requirement for your partnership to exist?

Score 1 point for each of the above questions that you can answer "yes" to.

Now plot your total score out of 5 on the vertical "strategic significance" axis and draw a horizontal line on the chart going through that point on the vertical axis.

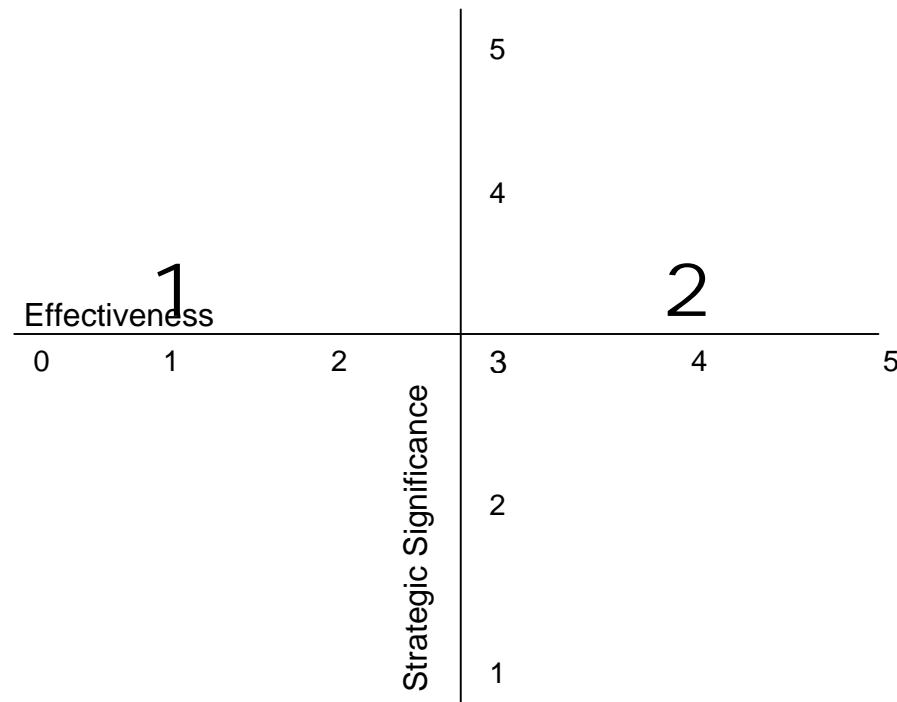
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EFFECTIVENESS

Does the partnership:

- Have a clear strategic plan with defined priorities and key outcomes?
- Have an agreed action plan with SMART (specific, measurable, achievable, realistic, timely) targets arising from the strategy?
- Account systematically to stakeholders for activity and achievement?
- Record action points, with active tracking of progress against those points?
- Conduct itself in a business like manner, with accurate minutes kept etc? (Please refer to the statement of good practice in protocol).

Score 1 point for each “yes” answer in this section, and plot a point on the horizontal axis according to your points total and draw a vertical line on the chart going through that point on the horizontal axis. You should now be able to identify a point on the chart where the two lines that you have drawn intersect, which will give an indication of the strategic significance and effectiveness of your partnership. So if for example that point is in quadrant 2 it is both strategically significant and effective, partnerships in quadrant 1 are strategically significant but their operation may not be effective, and these are our **highest priorities** for the more detailed evaluation in part 2. If your partnership falls in one of the lower quadrants reviewing it is not a corporate priority, but you may like to consider doing so in order to enhance efficiency.



PARTNERSHIP EVALUATION TOOL PART 1



Guidance Notes

This is part 2 of the Partnership Evaluation Tool, and should not be undertaken without either having previously completed part 1, or as required by your line manager. Further guidance and assistance in using this tool is available from John Hodt on extension 8066, or by email on john.hodt@dudley.gov.uk.

This Partnership Evaluation Tool (PET) has been developed by the corporate Partnership Working Improvement Group, which was set up to address the areas for improvement raised in the Audit Commission's 2004 report on partnership working at Dudley MBC. The purpose of this part is twofold:

- A. To enable you to look at your partnership in more detail and identify up to 5 improvement priorities, and
- B. To arrive at an overall "at a glance" assessment of your partnership using a simple colour coding system.

In line with Neighbourhood Renewal Unit guidance on effective partnership working the 6 key themes that we are examining are "strategic, inclusive, action focussed, performance managed, efficient, and learning and development." Each theme is on a separate page and consists of a number of criteria, and by answering a series of "yes or no" questions you will be able to arrive at a score for each criterion as follows:

- 1. If the answer to all questions is no.
- 2. If the answer to the majority of questions is no.
- 3. If the answers are divided half and half between yes and no.
- 4. If the majority of your answers are yes.
- 5. If the answer to all questions is yes.

You may feel that ideally you would like to answer some questions "yes and no." The scoring system does not cater for that, but we suggest that you answer according to your first reaction to the question, and then note your qualifications for future reference. You will be able to arrive at a score for each theme using the simple scoring table on each page, and there is also space to record any actions which you believe may bring about necessary improvements under each theme.

The final page allows you to compare theme scores and thereby decide which of the themes are in most pressing need of improvement. We recommend that you choose no more than 5 improvement actions because this will enable you to have a manageable number of actions on which to concentrate, and when those actions are completed successfully there will be opportunity in subsequent evaluations to identify further actions.

Theme	Criteria	Scoring					
Strategic	A. Partnership's terms of reference. 1. Are they clear? 2. Have they been approved by the council? 3. Is there a review process?	Criterion	Score (1 - 5)	1. The answer to all questions is no. 2. The answer to the majority of questions is no. 3. The answers are divided half and half between yes and no. 4. The answer to the majority of questions is yes. 5. The answer to all questions is yes.			
	B. Coordination of Local Authority's plans with the partnership's plans. 1. Are there explicit references thereto? 2. Are there shared targets? 3. Is there dialogue with the authors of those plans?	A					
		B					
		C					
		D					
	C. Coordination of planning cycles. 1. Is this coordination documented? 2. Is it reviewed regularly? 3. Are plans in place to address gaps?	E					
		Total		Theme score (Total divided by 5)			
	D. Local Authority representatives. 1. Do they take a prominent role in ensuring that clear direction is set? 2. Do they enable and support partners to carry the partnership forward?	Improvement Actions					
					E. DMBC representation 1. Is the level of DMBC representation appropriate to the strategic significance of the group? 2. Is there documented authorisation for individuals' involvement? 3. Are relevant issues reported back within the DMBC framework?		
	Please make notes here on any criterion score of less than 3.						

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Theme	Criteria	Scoring			
Inclusive	A. Are all partners equipped and informed for their roles? <ol style="list-style-type: none"> 1. Is there an induction process? 2. Is the basis for membership documented? 3. Is it regularly reviewed? 4. Are partner agencies actively supportive of community capacity building activities? 5. Does the Local Authority play an active part in any capacity building? 	Criterion	Score (1 - 5)	<ol style="list-style-type: none"> 1. The answer to all questions is no. 2. The answer to the majority of questions is no. 3. The answers are divided half and half between yes and no. 4. The answer to the majority of questions is yes. 5. The answer to all questions is yes. 	
		A			
		B			
		C			
		Total		Theme score (Total divided by 3)	
	B. Is equality promoted by the partnership? <ol style="list-style-type: none"> 1. Is the promotion of equality included in terms of reference, objectives etc? 	Improvement Actions			
	C. Is membership appropriate for the stated purpose? <ol style="list-style-type: none"> 1. Are the right agencies represented? 2. Is the level of representation appropriate? 3. Is there consistency of attendance? 4. Are affected communities represented? 				
Please make notes here on any criterion score of less than 3.					

Theme	Criteria	Scoring			
Action Focussed	A. Are the decision making processes transparent? <ol style="list-style-type: none"> 1. Has the partnership documented its decision making process? 2. Where appropriate, are decisions effectively communicated to stakeholders? 3. Have council processes for decision making been taken into account? 	Criterion	Score (1 - 5)	<ol style="list-style-type: none"> 1. The answer to all questions is no. 2. The answer to the majority of questions is no. 3. The answers are divided half and half between yes and no. 4. The answer to the majority of questions is yes. 5. The answer to all questions is yes. 	
		A			
		B			
		C			
		D			
	B. Has partnership working led to identifiable changes in service delivery? <ol style="list-style-type: none"> 1. By partner agencies? 2. By the council? 3. In your service area? 	Total		Theme score (Total divided by 4)	
C. Linkages between corporate strategic priorities and partnership actions. <ol style="list-style-type: none"> 1. Are partnership actions explicitly linked to corporate strategic priorities? 2. Are these links documented? 3. Are there SMART targets for each of these actions? 4. Are partnership resources aligned with council resources to deliver those actions? 	Improvement Actions				
D. Do the partnership's activities contribute <ol style="list-style-type: none"> 1. To the Local Authority's statutory duties to tackle discrimination, and promote equality and good relations between different groups? 2. To the Neighbourhood Renewal Strategy aim of narrowing the gap between areas of deprivation and the borough as a whole? 					
Please make notes here on any criterion score of less than 3.					

Theme	Criteria	Scoring		
Performance Managed	A. How is partnership performance reviewed? <ol style="list-style-type: none"> 1. Is the frequency of planned reviews appropriate? 2. Is there a clear model or process? 3. Do these take place as planned? 4. Are lead members involved in performance assessment? 5. Is there a clear evidence base for all reviews? 	Criterion	Score (1 - 5)	<ol style="list-style-type: none"> 1. The answer to all questions is no. 2. The answer to the majority of questions is no. 3. The answers are divided half and half between yes and no. 4. The answer to the majority of questions is yes. 5. The answer to all questions is yes.
	A			
	B			
	C			
	Total		Theme score (Total divided by 3)	
	B. Reporting of reviews <ol style="list-style-type: none"> 1. Is the basis on which a review is made documented and reported? 2. Are results included in the corporate quarterly performance review? 	Improvement Actions		
C. Decision making and accountability. <ol style="list-style-type: none"> 1. Are there clear protocols for making decisions on performance? 2. Are actions arising out of decisions Specific, Measurable, Achievable, Realistic, and Timely? 3. Is there a clear line of accountability for progress towards those actions? 				
Please make notes here on any criterion score of less than 3.				

PARTNERSHIP EVALUATION TOOL PART 1

Theme	Criteria	Scoring			
Efficient	A. Is the partnership business like? <ol style="list-style-type: none"> 1. Are meetings chaired effectively? 2. Are meetings minuted accurately? 3. Are action points clear in terms of requirement and responsibility? 4. Are papers in time and of sufficient quality for adequate preparation? 	Criterion	Score (1 - 5)	<ol style="list-style-type: none"> 1. The answer to all questions is no. 2. The answer to the majority of questions is no. 3. The answers are divided half and half between yes and no. 4. The answer to the majority of questions is yes. 5. The answer to all questions is yes. 	
		A			
		B			
		C			
		D			
	B. Are issues progressed? <ol style="list-style-type: none"> 1. Are partners held accountable for carrying out minuted actions? 2. Is there follow up where actions are not carried out? 	Total		Theme score (Total divided by 4)	
	C. Does the partnership have an overview of its progress? <ol style="list-style-type: none"> 1. Is there an action plan? 2. Is it reviewed? 3. Is the frequency of review appropriate? 	Improvement Actions			
	D. Partnership resources (including contributions in kind). <ol style="list-style-type: none"> 1. Do you know what it costs to run the partnership? 2. Does the council contribute proportionately to the running of the partnership and its activities? 				
Please make notes here on any criterion score of less than 3.					

Theme	Criteria	Scoring			
Learning & Development	A. Do members and officers feel they have the skills necessary to fulfil their role? 1. Has a skills audit been undertaken? 2. Is this regularly reviewed? 3. Is there easy access to relevant training?	Criterion	Score (1 - 5)	1. The answer to all questions is no. 2. The answer to the majority of questions is no. 3. The answers are divided half and half between yes and no. 4. The answer to the majority of questions is yes. 5. The answer to all questions is yes.	
	B. Are opportunities given to address any shortcomings? 1. Are there resources to address gaps? 2. Does the culture/ethos of the partnership encourage partnership skills enhancement?	A			
		B			
		C			
	C. Sharing good practice. 1. Is the partnership's good practice recognised? 2. Is good practice celebrated? 3. Is good practice shared with others?	D			
	D. Gaps in good practice. 1. Does the partnership actively work to identify its deficiencies? 2. Does the partnership accept the need to redress deficiencies? 3. Does it systematically seek to learn from others? 4. Is there an improvement action plan?	Total		Theme score (Total divided by 4)	
		Improvement Actions			
	Please make notes here on any criterion score of less than 3.				

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Please complete the grid below to give you an overall assessment of your partnership.

SELF ASSESSMENT SUMMARY		
Theme	Score	By comparing the scores to the left for each of the themes you should be able to identify those with the lowest scores as those which should take priority in your improvement plan. You are advised to have no more than 5 so that you have a manageable number of issues to work on, which means that you will not need to identify an improvement action for the highest scoring theme. Also if there is more than one theme for which the score is 4 or higher you may feel that you do not wish to set 5 improvement actions.
Strategic	/5	
Inclusive	/5	
Action focussed	/5	
Performance managed	/5	
Efficient	/5	
Learning & development	/5	
TOTAL	/30	

The chart below will enable you to give a colour coding to your partnership:

Score	Colour	
25 - 30	Green	
19 - 24	Amber Green	
13 - 18	Amber	
1 - 12	Red	

Please identify below your **top priorities** for improvement over the next year, you may not have as many as 5, see the previous paragraph.

	Theme	Improvement Action	Outcome	Responsible Officer
1				
2				
3				
4				
5				

Date self assessment carried out	
Names of participating officers	
Planned date for review of self assessment	